



# LIC Winter CEO Forum

[www.loma.org/LICCEO](http://www.loma.org/LICCEO)

JW Marriott Orlando Bonnet Creek Resort & Spa  
January 31-February 1, 2022



The industry's only forum for CEOs of insurance companies with limited resources to share practical solutions and develop a close personal network of peer CEOs.

## PRELIMINARY AGENDA

### Monday, January 31, 2022

- 8:00-8:30 a.m. **Continental Breakfast**
- 8:30-10:00 a.m. **Welcome, Introductions & Activity Reports**
- 10:00-10:30 a.m. **Networking Break**
- 10:30 a.m.-12:00 p.m. **Presentation**
- 12:00-1:00 p.m. **Networking Luncheon**
- 1:00-3:00 p.m. **Facilitated Discussion with Live Polling**

The LIC CEO Forum offers a unique opportunity to discuss your biggest challenges with other small-to-midsize life insurance company CEOs. Topics requested so far include:

- Sales
- Strategic Planning
- Operational Efficiency
- Digital Transformation
- Cutting Edge Underwriting
- Impact of Inflation
- Interest Rate Environment
- Investment/Asset Management – Inhouse or Outsourced?
- New Trends in Annuity Sales
- Cadence for Strategic Planning and Forecasting
- Hiring Senior Management

- 3:00 p.m. **Adjourn for the Day**
- 6:30-8:30 p.m. **Hosted Networking Dinner with the LIC Board (Spouses Welcome)**

### Tuesday, February 1, 2022

- 8:00-8:30 a.m. **Continental Breakfast**
- 8:30-9:30 a.m. **CEO Case Study**
- 9:30-9:45 a.m. **Networking Break**
- 9:45-11:00 a.m. **Facilitated Discussion with Live Polling (continued)**
- 11:00 a.m. **CEO Forum Adjourns**
- 6:00-7:00 p.m. *LIC Annual Meeting Kick-Off Reception - see [www.loma.org/LICAnnual](http://www.loma.org/LICAnnual)*

## EARLYBIRD ATTENDEE LIST

1891 Financial Life - Lisa Bickus, CEO  
 American Fraternal Alliance - Allison Koppel, CAE, CEO  
 American Home Life Insurance Company - Steve Lobell, CEO  
 American Savings Life Insurance Company - Byron Allen, President/CEO  
 BetterLife - Dan Shinnick, CEO  
 Catholic Order of Foresters - Greg Temple, President and CEO  
 Cincinnati Equitable Life - Tom Schrote, Chief Operating Officer  
 Columbian Mutual - Mike Fosbury, CFA, President & CEO  
 Converge Re - Ari Lindner, FSA, MAAA, CEO  
 CSA Fraternal Life - John Kielczewski, CLU, FLMI, President/CEO  
 CUNA Mutual - Tammy Schultz, President, Preplanning Solutions

Gleaner Life - Arell Chapman, Sr VP, Chief Operations & Technical Officer  
 GPM Life - Peter Hennessey IV, Executive Vice President & COO  
 Homesteaders Life Co - Steve Shaffer, FLMI, CPA, CEO  
 Investors Preferred Life - Tommy Mayes, CFP, President  
 KSKJ Life - Tony Mravle, FLMI, PHR, CEO  
 Liberty Bankers Insurance Group - Brad Phillips, Chief Executive Officer  
 Optimum Re - Francois Duguay, FSA, Executive VP & Chief Actuary  
 Puritan Life - Dierdre Woodruff, Senior Vice President  
 Slovene National Benefit Society - Joe Evanish, National President, CEO  
 SWBC - Joan Cleveland, President & Chief Executive Officer  
 WAEPA - Shane Canfield, MBA, CEBS, SPHR, RHU, CAE, CEO